

Department of Health and Human Services

Quality Assurance Case Review Checklist

Case Name	BG#	Date of Last Action	Supervisor	Eligibility Worker
CRITERIA	CASE INFORMATION			
	On File	Not on File	N/A	Necessary Action/Due Date
COMMON ELEMENTS				
Signed, date application				
Citizenship & Identity/Alien status				
Categorical Eligibility	Select One			
Pregnancy				
Disability				
Age (child/65+)				
Income				
Resources (verified or alleged)				
Referral for Other Benefits				
Third Party Liability				
FI-RELATED				
DHHS Form 2700				
School Attendance				
SSI-RELATED				
DHHS Form 185, Level of Care				
DHHS Form 118, HCBS Authorization				
DHHS Form 118A, HCBS Authorization				
DHHS Form 181, LTC Authorization				
DHHS Form 3291 or Physician's Stmt.				
DHHS Form 3264, Slot Reservation				
CRCF-01, OSS Authorization				
DHHS Form 1277, Intent to Return Home, or Intent to Return Home on Form 1296				
DHHS Form 1766-A, Burial Exclusion, or developed on DHHS Form 1296				
DHHS Form 905, Income Trust Agreement				
DHHS Form 3275, Promissory Note, Annuity, Trust Transmittal				

Quality Assurance Case Review Checklist

Instructions

The DHHS Form 1259, Quality Assurance Case Review Checklist, is completed by the eligibility worker or supervisor in response to a Medicaid Eligibility Quality Assurance (MEQA) or Payment Error Rate Measurement (PERM) request for a case record.

Common Elements on the DHHS Form 1259 must be completed for all cases. FI-Related or SSI-Related Elements are completed based upon the payment category of the requested budget group. The following guidelines must be observed:

I. Criteria

On File: The information is in the case record and has been verified, if required.

Not on File: The information is required, but is not on file and/or verified.

N/A: The information is not required.

II. Necessary Action/Due Date

If a DHHS Form 1233, Eligibility Checklist was issued and remains outstanding, enter the information that was requested and the date that information is due back from the applicant/beneficiary.

To the extent possible, all required information must be on file when the case is submitted to the reviewer; however, the response to MEQA/PERM should not be delayed pending the receipt of requested information. Any information that is not on file at the time of the action and the review is not considered in the review findings.